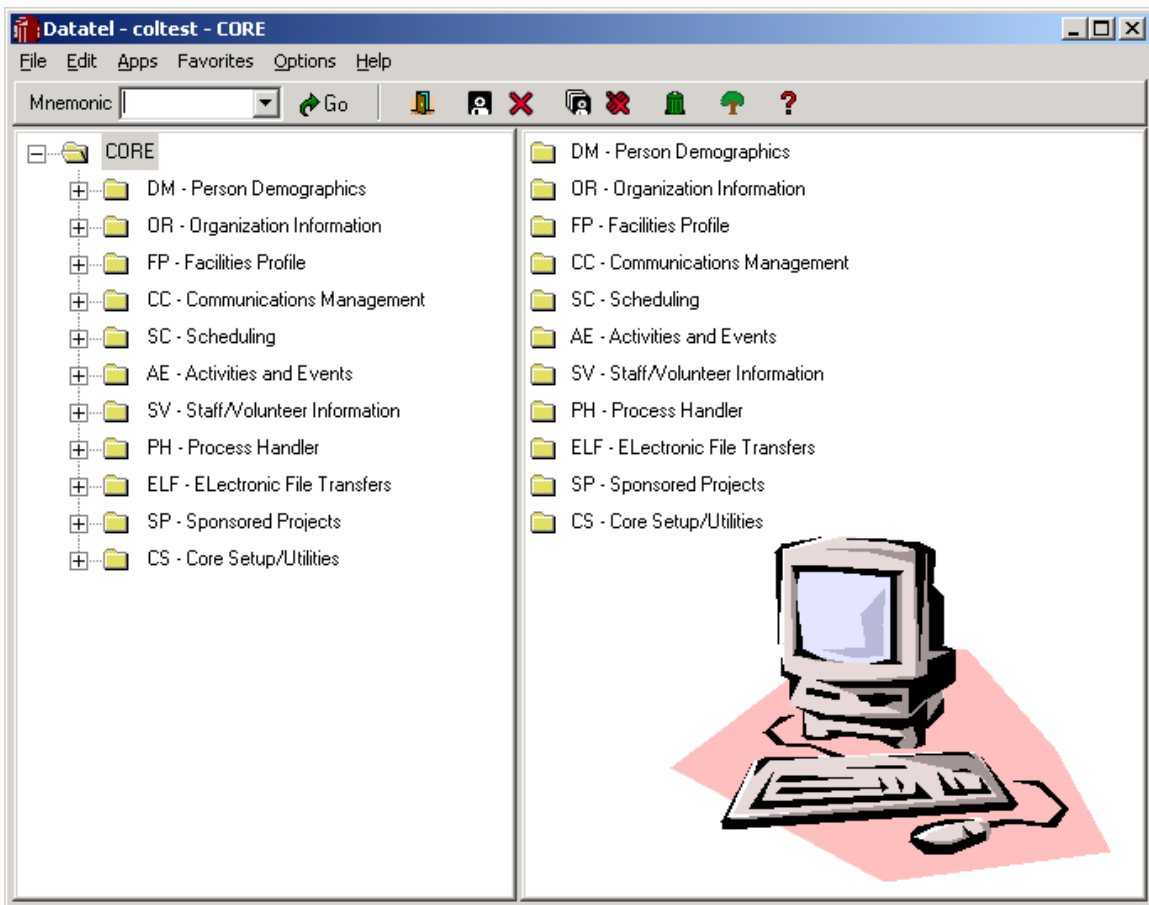




User Interface 1.0

Quick Start Guide



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Please note: This guide is not meant to be comprehensive but a quick start to using UI 1.0. For a more complete look at all the features, refer to Datatel's Guide to User Interface 1.0.

Legalese: This guide is adapted from Datatel's Guide to User Interface 1.0 and from Technology Services' Datatel documentation. Any plagiarism is deliberate.

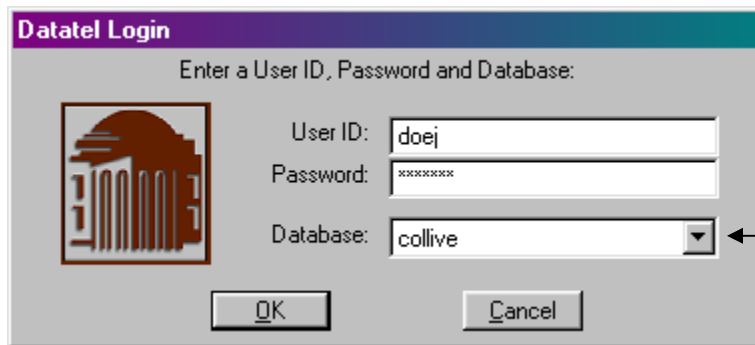
Logging In

Locate the Datatel UI icon on your desktop.

Double click the Icon. 

Alternately, you can access UI from the Datatel menu under Programs in the Windows Start menu.

The Datatel Login dialog box is displayed.

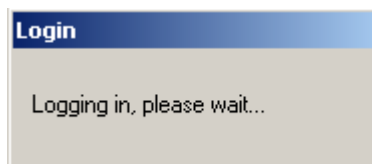


The image shows a 'Datatel Login' dialog box with a purple header and a grey body. It contains a logo on the left and three input fields on the right: 'User ID' with 'doej', 'Password' with '*****', and 'Database' with a dropdown menu showing 'collive'. There are 'OK' and 'Cancel' buttons at the bottom. An arrow points to the dropdown menu with the text 'Pull down to view accounts available'.

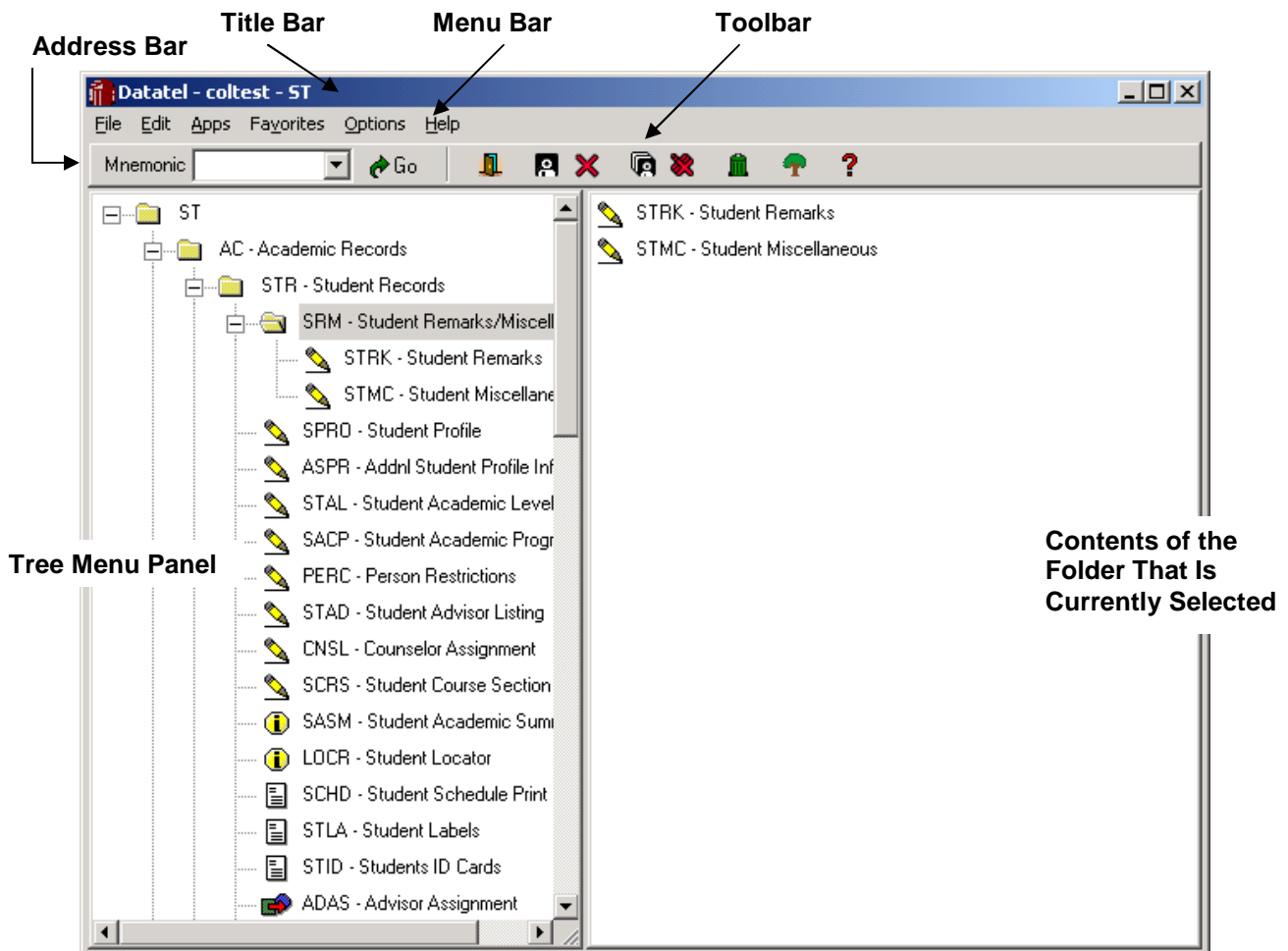
Pull down
to view
accounts
available

- Enter your User ID. This is typically your last name, followed by your first initial and is limited to 8 characters. In the example above, Jane Doe's User ID is doej.
- Enter your password. Your password must contain both numbers and letters and must be between 6 and 8 characters.
- Select the database you want from the drop down list.
- Click OK.

A dialog box stating that User Interface 1.0 is loading application files will appear. When it has finished loading the files, the application workspace will appear.



Application Workspace



Application Workspace Overview

The application workspace is the container for all processes in Colleague.

The left panel of the application workspace displays the folders and processes available for the selected application in expandable tree format.

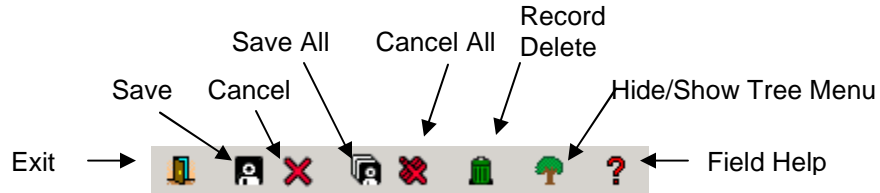
Navigating the workspace.



- Click the Plus sign next to any folder icon in the left panel to expand the folder.
- When a folder is expanded, you can click the Minus sign next to its icon to collapse it. Double-click a folder icon in either panel to expand the folder.
- Double-click a form icon in either panel to open the form.
- When a form is open, it is displayed in the right panel.


- You can choose to have the left panel of the application workspace remain visible (default condition), or hide it in order to allocate more space for the form.
- When no form is open, the right panel displays the contents of the folder that is currently selected.

Toolbar

The toolbar provides easy access to common functions, such as saving your work, canceling changes, deleting records, and accessing online help.

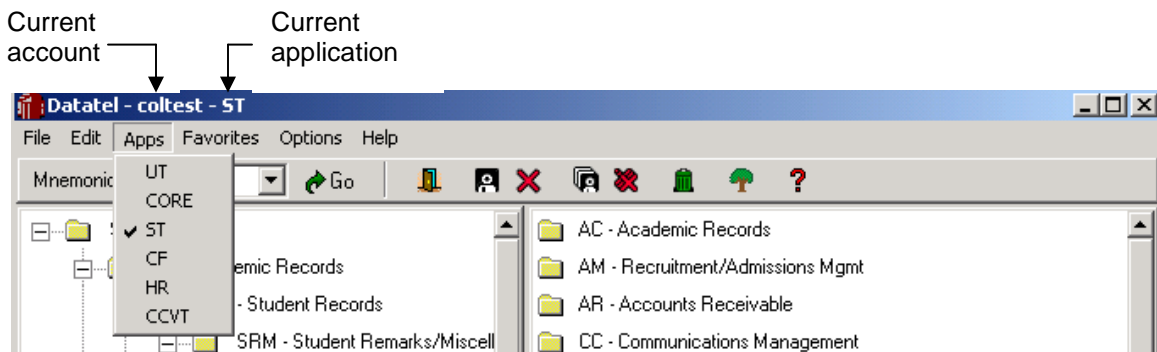


The Save All  and Cancel All  buttons and the corresponding File drop-down menu options enable you to save or cancel all of your changes simultaneously to every screen that is currently open.

Note: The Record Delete button  is used to delete an entire record, and only works for forms that have been defined to allow this option. When you click this button, you are prompted to confirm that you wish to delete the entire record.

Application


Application determines which modules and forms (screens) you can access. The current database and application is displayed in the title bar.





In this example, the application is the Student Application, ST and the account is coltest. To change to another application, select Apps from the menu and click the appropriate mnemonic.


Types of forms

The type of icon identifies the type of form.

 Maintenance – Allows you to enter and change data. If your database administrator has given you read-only access, you will be allowed to view the form in inquiry mode only. The form will still display a maintenance icon.

 Processing - Starts a program that manipulates a record or group of records that operate behind the scenes. An example of this would be posting a group of records to the General Ledger.

 Inquiry – View information without changing it. Inquiry forms are forms that are designed to display information without allowing changes to that information.

 Report - Generate reports. A form allows you to input specifications before running the report.

Forms

Form Mnemonic


Form Name

The screenshot shows a software form titled "NAE-Name and Address Entry". At the top, a blue header bar displays "Doe, Miss Jane" and "ID: 0120462 SSN: 000-00-0002". Below this, the form is organized into several sections with various input fields, dropdown menus, and checkboxes. The fields include:

- Prefix: Miss (dropdown)
- Name LFM: Doe (text), Jane (text)
- Suffix: (empty dropdown)
- Address: 2 (text)
- CSZ/Cnty: Raleigh (text), NC (text), 27614 (text), WAKE Wake County (text)
- Res Cnty/: (empty text)
- Country: (empty text)
- Phone/Ext/Type: 1 (text), 555-1212 (text), HME Home (dropdown)
- Origin/Date: AAAP Application (dropdown), 12/02/02 (calendar)
- SSN: 000-00-0002 (text)
- Birth Date: 08/08/1980 (calendar)
- Ethnic/Gender: AI American Indian, Alaskan (text), F (text)
- Mail Codes: 1 (text)
- E-Mail Adr: 1 (text), H (dropdown), jay-do@yahoo.com (text)
- Pref Name: Miss Jane Doe (text)
- Mail Name: 1 (text), Miss Jane Doe (text)
- Other LFM: 1 (text)

Form Overview

Forms are where most of your work is done in Colleague. With previous user interfaces to Colleague, forms were called screens.

When a form is open it will display in the right panel of the application workspace, with its name and mnemonic displayed on a tab. You can allocate more viewing space to the form by clicking the Tree  icon on the toolbar or choosing Hide Tree Menu from the Edit menu. This will close the left tree menu panel and allow the form to occupy the entire application workspace. Click the Tree icon again or choose Hide Tree Menu from the Edit menu again to toggle this option off and display the tree menu in the left panel.

Depending on your monitor size, resolution and font size, scroll bars may be necessary to view the entire form.

UI offers several additional features in the form of control buttons that assist you in viewing and editing data



Detail button – Open another form for more detail on this field.



Date/Calendar button – Select a date from the calendar browser for this field.



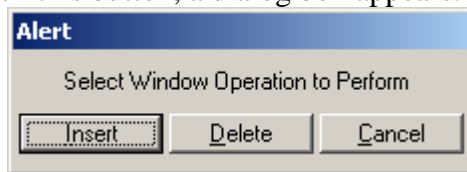
Calculator button – calculate a value for this field



Scroll buttons – access multiple values for this field



Window Operation button – allows you to insert or delete a row of data. When you click this button, a dialog box appears.



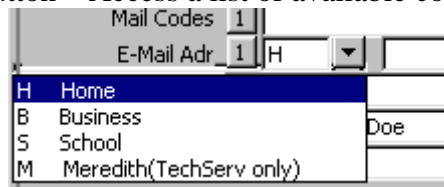
Click **Insert** to insert a new row above the current row.

Click **Delete** to delete the current row.

Click **Cancel** to leave the row unchanged and return to editing.



Drop-Down Edit button – Access a list of available codes for this field.



Validated Fields

With fields that are code-driven, such as validated fields, you will notice that the code's description disappears when you are entering data in the field. This is intentional. The code's description returns as soon as you leave the field.

Some code-validated fields use drop-down edit buttons to access their codes.

Other fields are lookup fields. When you select one of these fields, the word 'LookUp' will be displayed in the bottom left-hand corner of the form. Instead of a drop-down box, use LookUp by entering '...' in the field and pressing the Enter key. A resolution form will display and you can view the list of available values for this field.

Admit Status	UGF UG, First Time Freshman
Enroll Status	
Class Level	SR Senior

Enroll Status LookUp

Record Groups

A group is a set of related fields. Each field in a group can have multiple values. There are usually several fields in a group that are associated with each other in some way; these are often referred to as associated multivalued. Some sets of associated multivalued are presented as rows and some are presented as columns.

REL-Relation Information

Doe, Mr. John ID: 0120445
Farmville NC 27828

Spouse ID	Spouse Name	Birth Last Name	Source
<input type="checkbox"/> <input type="checkbox"/> 0120479	Mrs. D. Doe		

Child ID	Child Name	Gen	Birthday	Source	Class
1 0120462 <input type="checkbox"/>	Miss Jane Doe	F	08/08/1980		<input type="checkbox"/>
2 <input type="checkbox"/>					<input type="checkbox"/>
3 <input type="checkbox"/>					<input type="checkbox"/>

Group

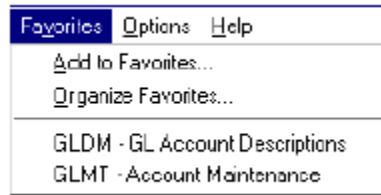
Accessing Forms

You can access forms in several ways.

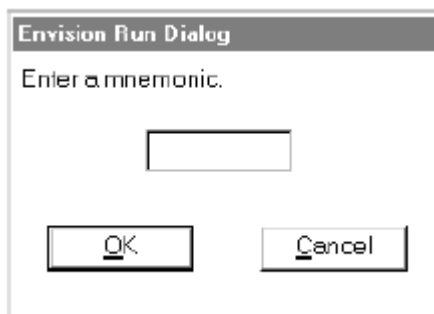
- **Tree.** Use the tree menu to navigate through the folders. Once you have selected the appropriate top-level folder, you can expand it to locate the desired form. To select a folder or form in a tree menu, double-click it.
- **Address Bar.** Enter a form mnemonic in the address bar or use the drop-down list to select a previously used form mnemonic. Press **Enter** or click the Go button to display the form.




- **Favorites.** Use the Favorites drop-down menu to select a form that has been previously added to your list of favorites.



- **History List.** Click the File menu to display the mnemonics of the last ten forms you accessed, and select a form from the list.
- **Run Dialog Box.** Choose Run from the File menu or press **Alt-F-R**. The Envision Run dialog box appears, as shown in Figure 3-14. Enter the mnemonic of the form you want, click **OK**, and Benefactor or Colleague will display it.

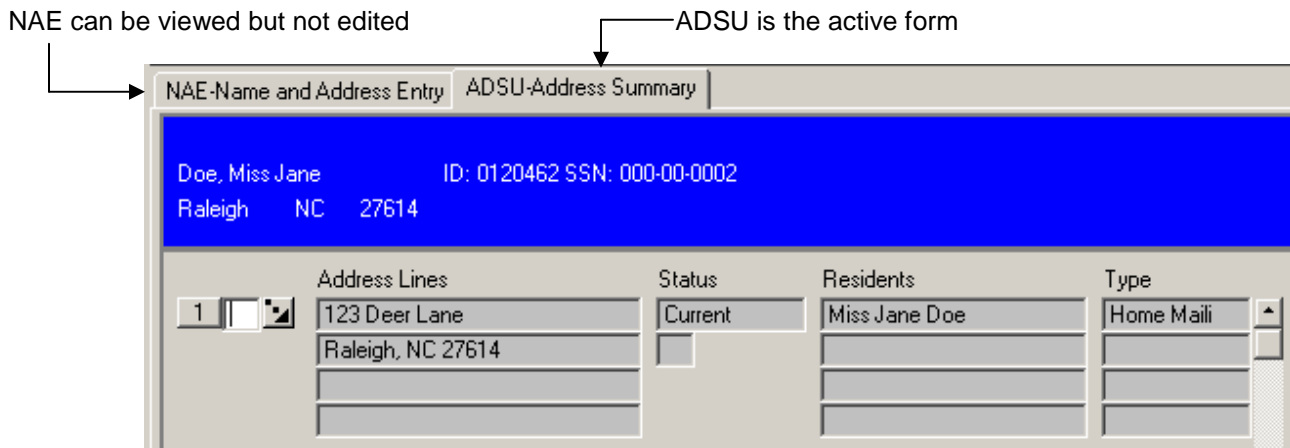


Accessing Detail Forms

When a field has a Detail button  next to it, you can access another form, called a detail form for more information about that item. You can use one of the following two methods to access a detail form from a detail field:



- Click the Detail button to the right of the field.
- With the cursor in the detail field, choose Detail from the File menu.

You will have more than one form open at once when you detail to another form. The tab furthest to the right represents the active form. To ensure that each record is completed properly, only one form can be edited at a time. All forms below the current open form are inquiry only and do not allow input. Data on these forms is grayed out while another form is active.



It is **important** to remember that when saving changes to a Detail Form, you must also save when exiting the preceding forms. If you don't save each form as you exit, all your changes will be lost.

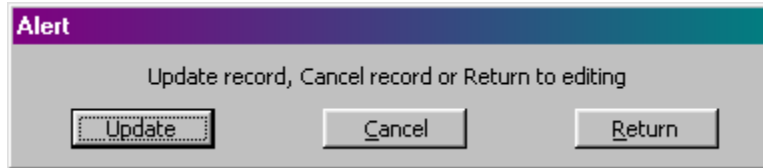
Shortcut:

The Save All  and Cancel All  buttons and the corresponding File drop-down menu options enable you to save or cancel all of your changes simultaneously to every screen that is currently open.


Exiting a Form

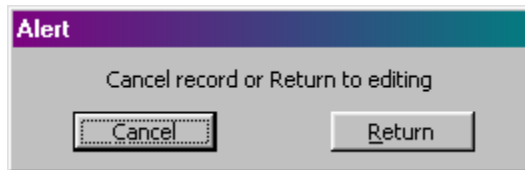
You can exit a form several ways – using the Toolbar, Menu or Function Keys.

 Use the Save button to save your changes to a record. This dialog box will display.





Update – Save changes to the record and go to the lookup prompt.
Cancel – Don't save changes but exit record to the lookup prompt.
Return – Go back to the record.

 Use the Cancel button to cancel any changes you made to the current record. This dialog box will display.



Cancel – Don't save changes but exit record to the lookup prompt.
Return – Go back to the record.

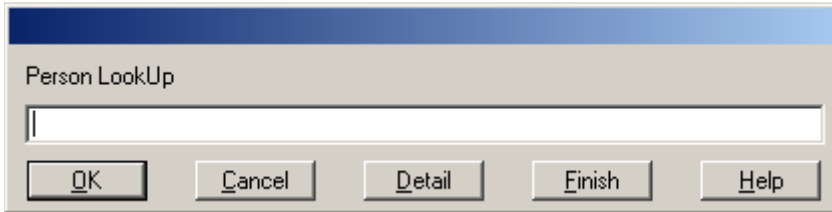
The Save All  and Cancel All  buttons will save or cancel all of your changes simultaneously to every screen that is currently open. You will NOT be prompted the 'are you sure?' dialog box. If you canceled all by mistake, your changes are lost and if you saved all by mistake, your changes are committed.

Other Ways to Exit a Form:

File|Save or F10 key - then cancel or update or return – back to lookup prompt
File|Cancel or Shift-F8 key - then cancel or update – back to lookup prompt
File|Close or F9 key - then cancel or update or return – back to main window

Finding a Record - LookUps

Once you have accessed a form, you will need to access the records you want to use with that form. You will be prompted with a dialog box to enter lookup information.



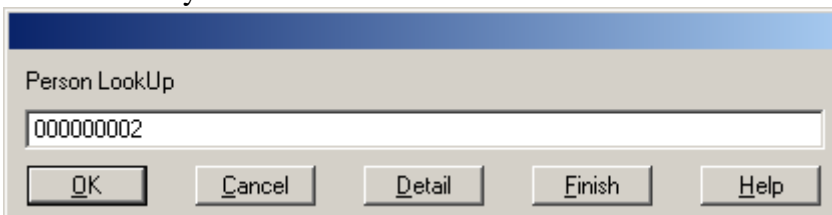
A screenshot of a 'Person Lookup' dialog box. The title bar is blue and contains the text 'Person Lookup'. Below the title bar is a text input field that is currently empty. At the bottom of the dialog box, there are five buttons: 'OK', 'Cancel', 'Detail', 'Finish', and 'Help'.

With the Person Lookup, you need to enter information that identifies the person you are looking for. There are several methods to look up a person.

- Datatel ID – Each person is automatically assigned a 7-digit id. If you have this number, it is the easiest way to locate that person. Leading zeros are not necessary.
- Social Security Number – Do not enter any dashes or spaces.
- Full Name – Enter Last name, First name.
- Partial Name – Enter any portion of the name, using at least two characters.

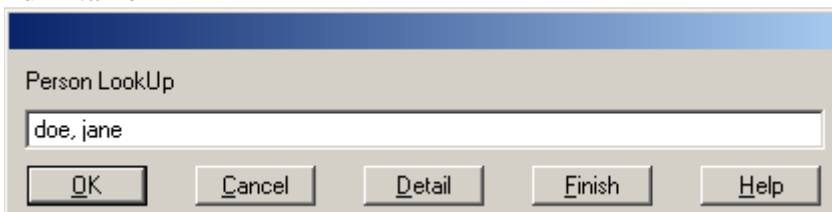
Enter the look up information in the lookup dialog box and click the OK button.

Social Security Number



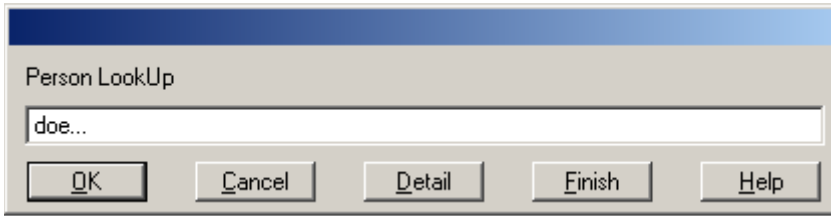
A screenshot of a 'Person Lookup' dialog box. The title bar is blue and contains the text 'Person Lookup'. Below the title bar is a text input field containing the number '000000002'. At the bottom of the dialog box, there are five buttons: 'OK', 'Cancel', 'Detail', 'Finish', and 'Help'.

Full Name



A screenshot of a 'Person Lookup' dialog box. The title bar is blue and contains the text 'Person Lookup'. Below the title bar is a text input field containing the text 'doe, jane'. At the bottom of the dialog box, there are five buttons: 'OK', 'Cancel', 'Detail', 'Finish', and 'Help'.

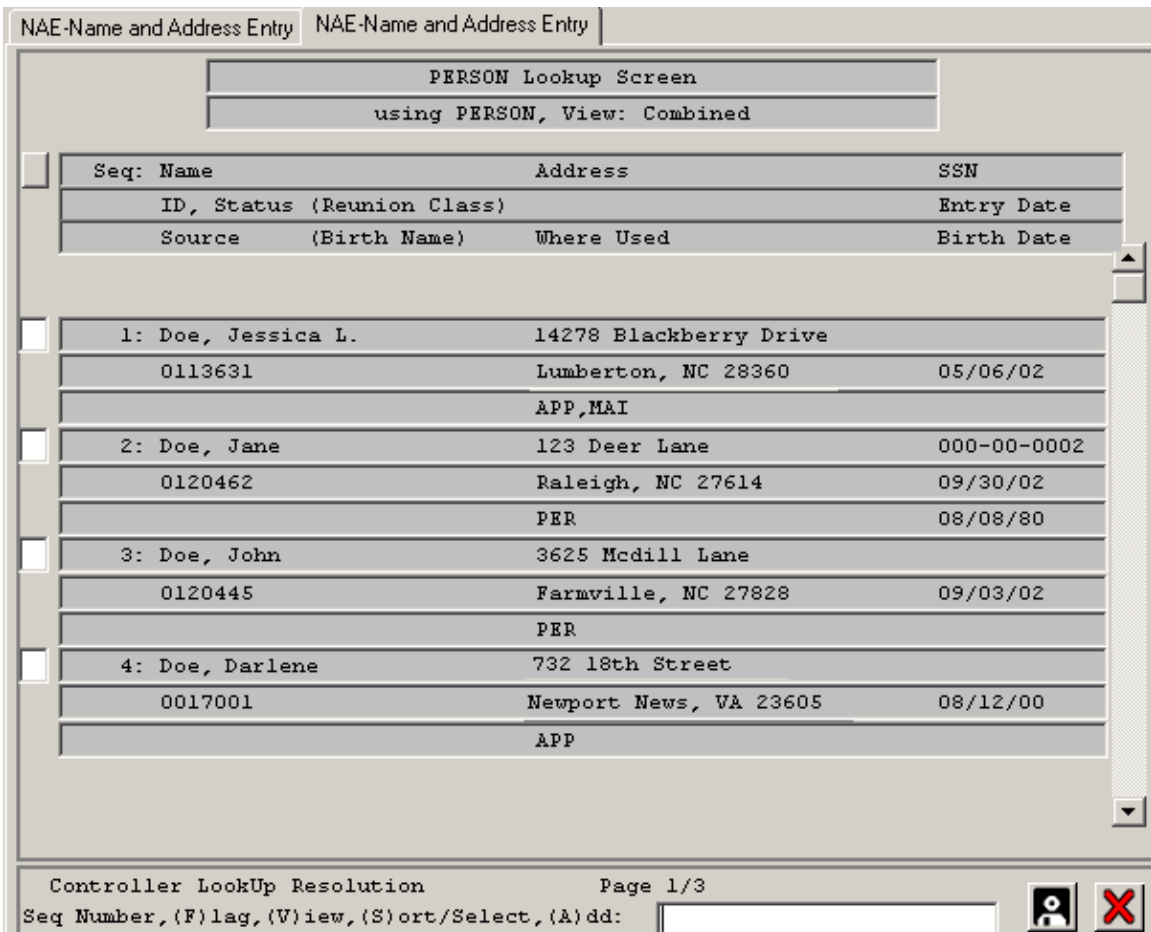
Partial Name



A dialog box titled "Person LookUp" with a text input field containing "doe...". Below the input field are five buttons: "OK", "Cancel", "Detail", "Finish", and "Help".

If you entered the Datatel ID or social security number for your lookup, the form you are trying to access will appear and the fields will be populated with the information from that person's record.

If you used a name lookup, a resolution form will appear that lists all the possible matches for the lookup criteria you entered.



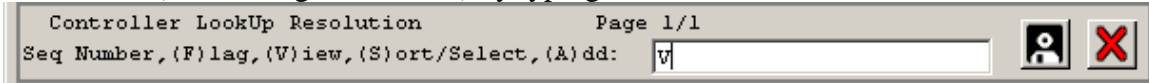
A resolution form titled "PERSON Lookup Screen" with the subtitle "using PERSON, View: Combined". The form displays a table of search results with columns for Seq, Name, Address, SSN, ID, Status (Reunion Class), Entry Date, Source, (Birth Name), Where Used, and Birth Date. The results are listed in four groups, each with a checkbox on the left.

Seq	Name	Address	SSN	ID	Status (Reunion Class)	Entry Date	Source	(Birth Name)	Where Used	Birth Date
<input type="checkbox"/>	1: Doe, Jessica L.	14278 Blackberry Drive								
		0113631	Lumberton, NC 28360			05/06/02				
			APP,MAI							
<input type="checkbox"/>	2: Doe, Jane	123 Deer Lane	000-00-0002							
		0120462	Raleigh, NC 27614			09/30/02				
			PER			08/08/80				
<input type="checkbox"/>	3: Doe, John	3625 Mcdill Lane								
		0120445	Farmville, NC 27828			09/03/02				
			PER							
<input type="checkbox"/>	4: Doe, Darlene	732 18th Street								
		0017001	Newport News, VA 23605			08/12/00				
			APP							

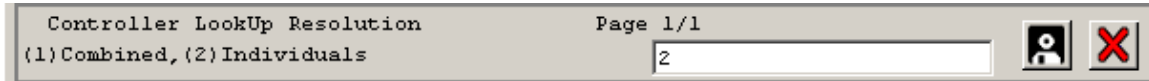
Controller LookUp Resolution Page 1/3
Seq Number, (F)lag, (V)iew, (S)ort/Select, (A)dd:

The resolution form will show a variety of information for each record, including name, address and social security number. You can tell if the record listed belongs to a student by looking at the 'Where Used' field (second column, third line). If they are in the students file, STU will be listed here.



If the resolution form is showing numerous matches, you can limit the matches to individuals (eliminating institutions) by typing a 'V' in the box.



Then enter a '2' for individuals.

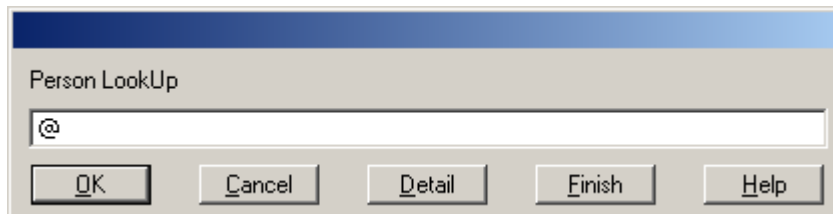


The resolution form will reappear with fewer matches.

- If you do not want to select any of the matches found, click the **Cancel** button  at the bottom of the screen.
- To select a record, click in the white box beside the desired record and click the **Save** button  on the bottom of the resolution screen. Or, enter the number beside the record you want and type it in the white box at the bottom of the screen and press the enter key.

Once you have selected a record, the form will load with the record for the selected person.

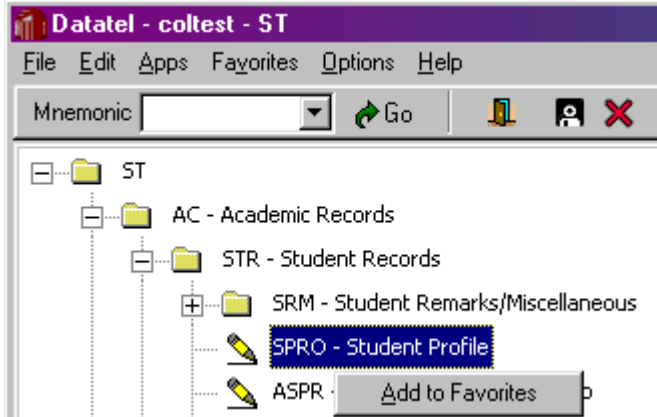
Shortcut: At the lookup prompt, enter @ to bring up the last record you accessed.



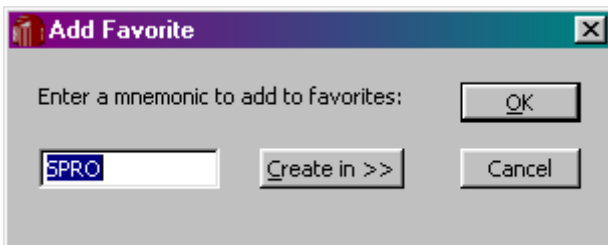
Add to Favorites

You can make a customized list of frequently used forms by adding them to Favorites on the menu bar.

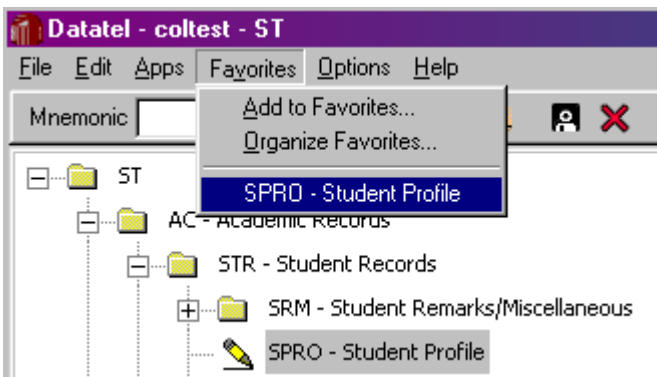
Select the form you want to add to favorites by clicking the right mouse button. Click the **Add to Favorites** pop-up.



The **Enter a Mnemonic** dialog box is displayed with the mnemonic for the selected form filled in. Click the **OK** button to add the form to your customized Favorites list. If you use folders to organize your Favorites, you can click the **Create in >>** button to select an existing folder or create a new folder for the shortcut.



Now you can access the form you just added from the Favorites option on the menu bar.

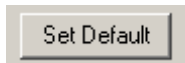


Query Builder

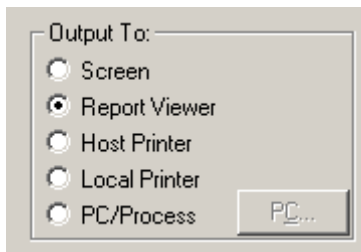
Use Query Builder to build queries that utilize UniQuery, the query language for the Colleague database.

Query Builder has two new features with UI:

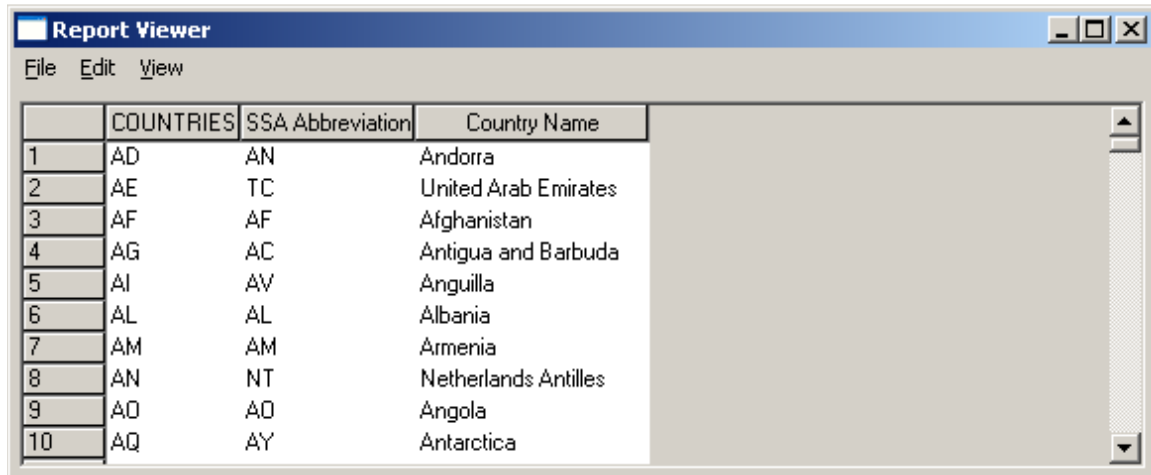
- Set Default
- Report Viewer



The **Set Default** button allows you to make the directory location of your choice the default location to open queries from and save queries to. Any query text that is in the Query Builder form when you click the **Set Default** button will become part of your new default parameters. When you click the **Clear** button, those parameters are loaded.



To use the Report Viewer, select it from the **Output To** section. When you click the **OK** button to run your query, a File Import Monitor dialog box will show briefly before the Report Viewer displays your data.



- Select Edit|Select All from the menu to copy all data or highlight a subset of data with your mouse and select Edit|Copy.
- From the Edit drop-down menu, select Copy to Excel, Word, HTML Editor or HTML Browser to import the data.

Datatel Terminology

Application-Main subdivision of Colleague, a set of modules grouped together to meet the needs of a broad functional area. Each module resides in one of four applications: HR (Human Resources), CF (Financials), CORE (Demographic Information), ST (Student)

Databases-Datatel provides several different databases. Each database uses the same programs, but contains a different set of data. Before logging in, you should determine which database you need to use. You will have access to two different databases: **coltest** (A test database, we use this one to determine what our processes will be), **collive** (The real information).

Colleague- Datatel's integrated software suite written for higher education for administrative processes.

Frontview-Provides the user with a full graphical user interface.

Mnemonic- 3 or 4 character code that stands for a form name.

Module- Grouping of mnemonics into categories. Each module corresponds to a specific functional area such as Registration, Academic Records, or Accounts Receivable.

User Interface 1.0-Replaces Frontview as the graphical user interface to access Colleague.

Useful Info

Changing Your Password

- Access the Change Password function-**XPWD**.
- Enter login password: Enter your current password, not the new password that you want to create.
- New Password: Enter what you want your new password to be. Nothing will show on the screen. (use at least 6 characters, combination of letters and numbers)
- Re-enter new password: Enter new password again.

Helpful Hints

F9 Close this form.

F10 Return to the lookup prompt for this form.

@ Use at a lookup prompt will retrieve the last record accessed for the current form.

Common Forms

XPWD-Change Password

NAE-Name and Address Entry (details to ADSU)

ADSU-Address Summary

Lookups

Hints for a lookup on the Person file:

- SSN- Type in the number, no spaces or dashes **123456789**
- Full, Name- Last name, First name **jones, susan**
- Partial name-Any portion of the name, must be at least 3 characters **jon...**

Problems logging in?

- ✓ Make sure you are logging into the correct database.
- ✓ Login name and password must be in lower case.
- ✓ Computer must be connected to the campus network.
- ✓ If you cannot access a form, make sure you are in the correct application.

Who To Call

Technical Problems-Help Desk	760-2323
Datatel-specific Technical Problems-Information Systems Help	760-8989
Questions about student data- Registrar's Office	760-8593